

Securities Gift Form

Rudolf Steiner School • 15 East 79th Street New York, NY 10075
Tel: 212-535-2130 • Fax: 646-786-3897 • www.steiner.edu

Instructions for Donating Securities

To make a gift of securities to Rudolf Steiner School, please complete this form and fax it to us using the contact and account information below.

NOTICE OF TRANSFER OF SECURITIES

Account Details:

Cambridge Investment Research
NFS Account #B9F-252603
DTC# 0226

For additional assistance please contact our broker.

David A Schneider, CFP®
Schneider Wealth Strategies
41 Madison Avenue, Floor 31
New York, NY 10010

(212) 924-2290 Phone
(800) 461-3283 Toll Free
(800) 291-3742 Fax
david@schneiderwealthstrategies.com
www.schneiderwealthstrategies.com

School Tax ID #: **13-1624162**

Name of Security: Number of _____

Shares: _____

Value of Transfer: _____

Name of Contact and Firm: _____ Tel: _____

Date of Transfer: _____

Please note: in order to receive credit for your gift, you MUST notify:

Felicia Fischetti, Philanthropy Operations Coordinator, Rudolf Steiner School Tel:
212.535.2130 ext. 223 • Fax: 646-786-3897 • email: ffischetti@steiner.edu